

CLAIMS

What is claimed is:

1. A method for managing customer relationship management (CRM) resources comprising the steps of:
 - communicatively linking a service router to a plurality of service resources;
 - for each of said service resources, establishing at least one routing criterion;
 - receiving a plurality of service requests via a plurality of communication channels;
 - analyzing said service requests for request characteristics;
 - comparing said request characteristics to routing criteria;
 - automatically routing each of said service requests to a selected service resource based at least in part upon said comparing step; and,
 - dynamically altering values for said routing criteria based upon feedback.
2. The method of claim 1, wherein said communication channel of said receiving step is selected from the group consisting of a telephony channel, a teleconference channel, a co-browsing channel, an Internet chat channel, an instant messenger channel, an email channel, a postal mail channel, and a fax channel.
3. The method of claim 1, wherein said routing criteria of said establishing step is selected from the group consisting of resource availability, resource skills, resource language, resource location, resource cost, resource service efficiency, resource sales efficiency, resource customer satisfaction, and resource management satisfaction.
4. The method of claim 1, further comprising the step of:
 - for each of said service resources, identifying at least one communication channel over which said service resource can respond to said service requests, wherein values for said at least one routing criterion depend upon said identified communication channel.
5. The method of claim 1, further comprising the step of:

receiving said feedback from a plurality of sources at least a portion of which reflect past performance in handling past service requests.

6. The method of claim 5, further comprising the steps of:
 - automatically extracting said feedback from a feedback instrumentality; and,
 - assigning a feedback rating to said feedback.
7. The method of claim 1, further comprising the steps of:
 - data mining customer sales information to rate the success of a particular service request response; and,
 - responsive to said data mining step, altering at least a portion of said routing criteria for said service resource associated with said service request response.
8. The method of claim 1, further comprising the steps of:
 - monitoring at least a portion of said service requests to obtain performance information;
 - determining efficiency metrics from said monitoring; and,
 - dynamically altering values for said routing criteria based upon said efficiency metrics.
9. The method of claim 1, further comprising the step of:
 - administratively modifying values for said routing criteria via a routing management interface.
10. A method for routing customer service requests within a customer relationship management (CRM) system comprising the steps of:
 - receiving a service request from a customer via a communication channel;
 - searching a routing data store for available service resources, wherein at least a portion of said service resources represent customer service representatives;

for each available service resource, computing a resource preference rating based at least in part upon previous service resource interactions via said communication channel;

selecting a service resource for said customer service request based upon said resource preference rating; and,

establishing communications via said communication channel between said customer and said selected service resource.

11. The method of claim 10, wherein said computing step further comprises the steps of:

for each service resource, receiving a plurality of criteria values for routing criteria;

identifying routing weights for each of said routing criteria;

for each of said routing criteria, multiplying said routing weight and said criteria value; and,

summing results from said multiplying to compute said resource preference rating.

12. The method of claim 10, further comprising the steps of:

receiving feedback about said service request; and,

automatically altering at least one of said criteria values of an associated service resource in response to said feedback.

13. A system for managing customer relationship management resources comprising:

a service router communicatively linked to a plurality of response mechanisms through a plurality of communication channels, wherein said service router is configured to route service requests to selected ones of said response mechanisms;

a routing data store comprising a routing data utilized by said service router to route said service requests, wherein said routing data comprises criteria values for routing criteria; and,

a feedback processor configured to dynamically modify said routing data based upon received feedback, wherein at least a portion of said feedback is based upon past performance in handling past service requests.

14. The system of claim 13, further comprising:

a feedback warehouse configured to store feedback data received from a plurality of sources, wherein said feedback processor is configured to data mine said feedback data in order to alter said routing data.

15. The system of claim 13, further comprising:

a routing management interface configured to administratively alter said routing data.

16. The system of claim 15, wherein said routing management interface further comprises:

business analysis tools configured to permit at least one of managers and administrators to analyze, query, summarize, and generate reports using data from said system.

17. A system for managing custom relationship management (CRM) resources comprising the steps of:

means for communicatively linking a service router to a plurality of service resources;

for each of said service resources, means for establishing at least one routing criterion;

means for receiving a plurality of service requests via a plurality of communication channels;

means for analyzing said service requests for request characteristics;

means for comparing said request characteristics to routing criteria;

means for automatically routing each of said service requests to a selected service resource based at least in part upon said comparing step; and,

means for dynamically altering values for said routing criteria based upon feedback.

18. A system for routing customer service requests within a customer relationship management (CRM) system comprising the steps of:

means for receiving a service request from a customer via a communication channel;

means for searching a routing data store for available service resources, wherein at least a portion of said service resources represent customer service representatives;

for each available service resource, means for computing a resource preference rating based at least in part upon previous service resource interactions via said communication channel;

means for selecting a service resource for said customer service request based upon said resource preference rating; and,

means for establishing communications via said communication channel between said customer and said selected service resource.

19. A machine-readable storage having stored thereon, a computer program having a plurality of code sections, said code sections executable by a machine for causing the machine to perform the steps of:

communicatively linking a service router to a plurality of service resources;

for each of said service resources, establishing at least one routing criterion;

receiving a plurality of service requests via a plurality of communication channels;

analyzing said service requests for request characteristics;

comparing said request characteristics to routing criteria;

automatically routing each of said service requests to a selected service resource based at least in part upon said comparing step; and,

dynamically altering values for said routing criteria based upon feedback.

20. The machine-readable storage of claim 19, wherein said communication channel of said receiving step is selected from the group consisting of a telephony channel, a teleconference channel, a co-browsing channel, an Internet chat channel, an instant messenger channel, an email channel, a postal mail channel, and a fax channel.
21. The machine-readable storage of claim 19, wherein said routing criteria of said establishing step is selected from the group consisting of resource availability, resource skills, resource language, resource location, resource cost, resource service efficiency, resource sales efficiency, resource customer satisfaction, and resource management satisfaction.
22. The machine-readable storage of claim 19, further comprising the step of:
for each of said service resources, identifying at least one communication channel over which said service resource can respond to said service requests, wherein values for said at least one routing criterion depend upon said identified communication channel.
23. The machine-readable storage of claim 19, further comprising the step of:
receiving said feedback from a plurality of sources at least a portion of which reflect past performance in handling past service requests.
24. The machine-readable storage of claim 23, further comprising the steps of:
automatically extracting said feedback from a feedback instrumentality; and,
assigning a feedback rating to said feedback.
25. The machine-readable storage of claim 19, further comprising the steps of:
data mining customer sales information to rate the success of a particular service request response; and,
responsive to said data mining step, altering at least a portion of said routing criteria for said service resource associated with said service request response.

26. The machine-readable storage of claim 19, further comprising the steps of:
 - monitoring at least a portion of said service requests to obtain performance information;
 - determining efficiency metrics from said monitoring; and,
 - dynamically altering values for said routing criteria based upon said efficiency metrics.
27. The machine-readable storage of claim 19, further comprising the step of:
 - administratively modifying values for said routing criteria via a routing management interface.
28. A machine-readable storage having stored thereon, a computer program having a plurality of code sections, said code sections executable by a machine for causing the machine to perform the steps of:
 - receiving a service request from a customer via a communication channel;
 - searching a routing data store for available service resources, wherein at least a portion of said service resources represent customer service representatives;
 - for each available service resource, computing a resource preference rating based at least in part upon previous service resource interactions via said communication channel;
 - selecting a service resource for said customer service request based upon said resource preference rating; and,
 - establishing communications via said communication channel between said customer and said selected service resource.
29. The machine-readable storage of claim 28, wherein said computing step further comprises the steps of:
 - for each service resource, receiving a plurality of criteria values for routing criteria;
 - identifying routing weights for each of said routing criteria;

for each of said routing criteria, multiplying said routing weight and said criteria value; and,

summing results from said multiplying to compute said resource preference rating.

30. The machine-readable storage of claim 28, further comprising the steps of:
 - receiving feedback about said service request; and,
 - automatically altering at least one of said criteria values of an associated service resource in response to said feedback.